

# A NEW SPECIAL NEEDS TRUST

## **Third-party pooled flexible spending trust**

The Disability Foundation is pleased to offer a third-party trust for those wishing to improve the quality of life for someone they love living with a disability. Now, anyone, including parents, other relatives or friends can contribute money to a trust that provides financial stability without compromising public benefits for an individual living with a special need. The third-party trust is especially valuable for families with multiple children.

## **How it works**

Third-party trusts can be established with gifts directly to the trust, inheritance a grantor wishes to leave to the beneficiary or life insurance policy proceeds. Through this option, the money never belongs to the beneficiary, eliminating the Medicaid payback.

For more information about this, or any of our pooled trust options, contact us.





**THE DISABILITY  
FOUNDATION**

*Enriching lives, securing futures.*

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